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Isaac M. O'Bannon • Oct. 01, 2009

From the October 2009 Review of [W-2/1099 Compliance Systems](#).

For users of the ATX and TaxWise professional compliance systems, CCH Small Firm Services offers two options, Payroll Compliance Reporting and a W-2/1099 program, both of which can be used as a stand-alone system or as an integrated part of the ATX or TaxWise accounting suite. Both offer year-end wage and information reporting to the IRS and SSA, while the more robust Payroll Compliance Reporting system also offers all state withholding, unemployment and registration forms, along with 500 local forms. It also includes quarterly/annual payroll reporting tools and offers unlimited electronic filing to the IRS and SSA.

The Payroll Compliance Reporting system is offered under each tax software brand. Both ATX and TaxWise also offer additional modules for fixed asset management, write-up, document management, website building tools and bank products. The Payroll Compliance Reporting system, which this review focuses on, costs \$290 for a three-user license. The basic W-2/1099 system costs \$160.

USABILITY/NAVIGATION –

The Payroll Compliance Reporting system works independently of the professional tax application (either TaxWise or ATX), but integrates with those systems' accounting and document management modules, sharing data in those packages for business and recipient information. The program opens into the main interface for the tax program, which varies between TaxWise and ATX, but both provide very easy-to-use and well-designed screens and navigation that include tabbed access to key tax system features along with practice management tools, AR and

e-file management functions. The master selection list includes all of a firm's

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forms W-2, W-3, W-2G, W-2AS, W-2GU, W-2VI, 4852, 1098, 1098C, 1098E, 1098T and all versions of form 1099, along with their state counterparts.

Data entry can be performed directly onto form replicas or using an interview worksheet method, with data then transferred to the form. With either method, the data-entry screens offer tabbed access to specific form pages and parts, with W-2 withholding automatically calculated but overrideable if necessary. The tabs also provide easy access to reporting forms W-3 and 1096, which are automatically populated with data from employee and contractor recipient forms. The system tracks overrides and other edits using color-coded highlighting, and provides a built-in diagnostics system that alerts users to potential problems with form data or missing information. The TaxWise and ATX systems also offer smart entry features, such as selection lists prevention of duplicated EINs and TINs.

REPORTING –

Using the system as stand-alone or in conjunction with the professional tax compliance system, users have access to a fairly broad collection of reporting that includes summaries for W-2 and 1099 activities, along with billing, client lists and other options. The system can produce fileable versions of forms 1098, 1099, 5498s, W-2, W-3, 940, 941 and 944, and includes e-filing of reporting to the IRS and SSA. Reports and forms can also be saved to PDF format.

IMPORT/EXPORT CAPABILITIES –

The Payroll Compliance Reporting program integrates with the write-up, document management and scan-and-fill systems available for the ATX and TaxWise lines, with data flowing between system modules as necessary and thus reducing redundant

entry. For 2010, the ATX product will include the ability to import W-2 and

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while online support features include FAQs, a knowledgebase, user forums and free training tools. Technical support is included with the tax systems and the Payroll Compliance Reporting program.

2009 Overall Rating:

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